



Education & Outreach Transition



Education & Outreach Team

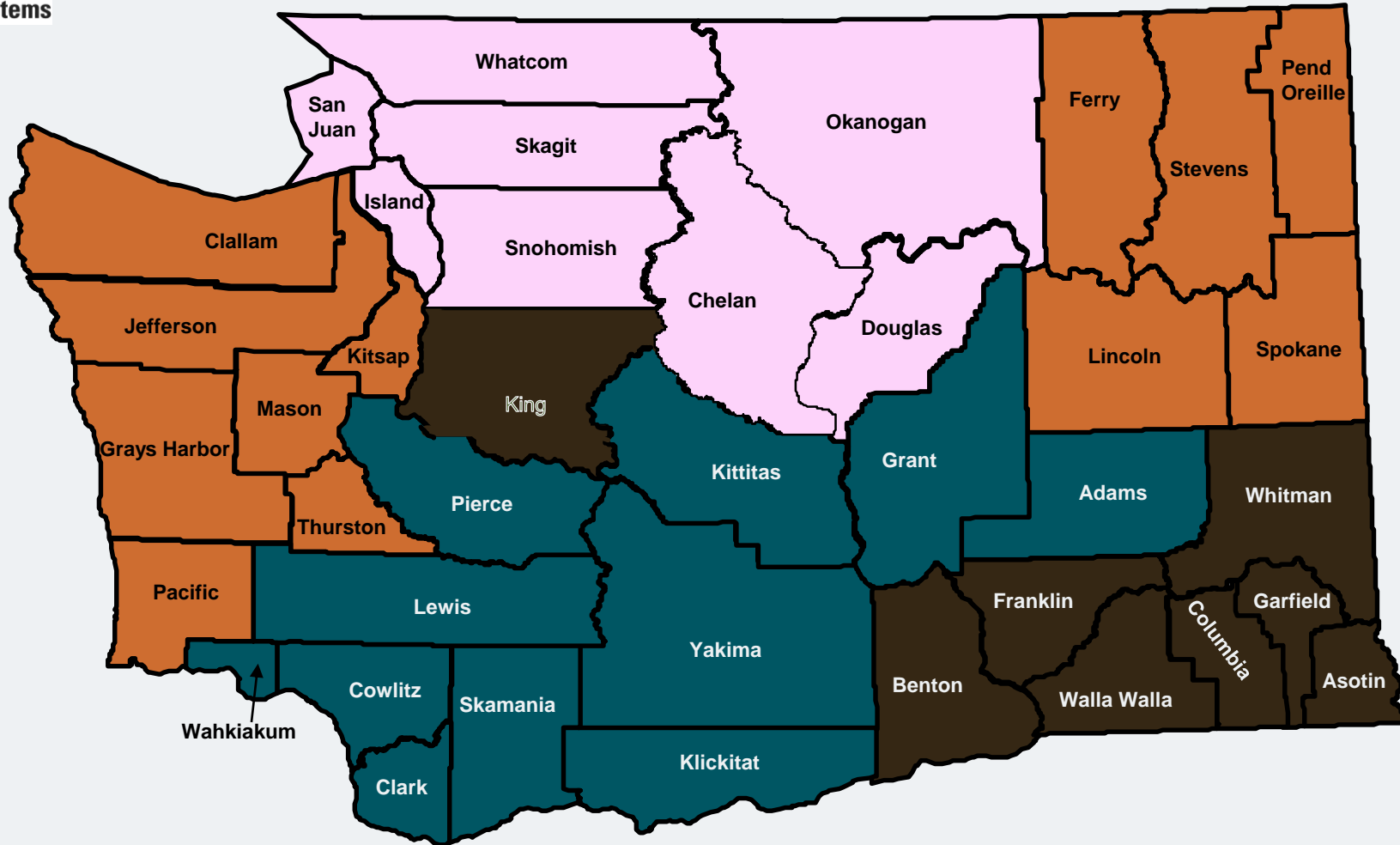
Team consists of four Benefits Marketing Representatives

Travels across the state to promote retirement education

- Retirement System Benefits
- Deferred Compensation Program (DCP)

Hold twenty-four retirement seminars throughout the state

Education & Outreach Team



Jim Mendoza, (360) 664-7012

Catherine Cadoo, (360) 664-7281

Stacy Rundle, (360) 664-7018

Jeff Dixon-Ross, (360) 664-7011

General Questions about E & O:
Tina Datish, (360) 664-7005

What's Changing

ICMA ends Plan 3 field training effective June 30, 2015

- Plan 3 education seminars and registration end
- Plan 3 website available until September 30, 2015

E&O Team assumes ICMA field training role effective: July 1, 2015

Empower Retirement assumes Plan 3 Record-Keeper responsibilities effective: October 1, 2015

Active Plan 3 Membership

TRS 75%

SERS 55%

PERS 20%

Education & Outreach Focus

April-June

Alert employers of pending change

- E&O Reps
- EAC
- ESS email to employers

Update DRS & ICMA websites

E&O Reps add Plan Choice to training

Develop Plan Choice webinar

Education & Outreach Focus (cont.)

July-September

- E&O Reps assume ICMA training

- Plan Choice training in conjunction with SD Benefit Fairs

- Highlight online Plan Choice video

- Plan Choice webinar available

October-December

- Plan Choice training in conjunction with PERS Benefit Fairs

- Integrate Empower Reps

Key Takeaways

E&O assumes Plan 3 field training – July 1, 2015

Plan 3 website (ICMA) available through September 30, 2015

Empower Field Reps onboard October 1, 2015

E&O and Empower Reps shared roles long term



Questions?